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ABSTRACT

This paper describes some of the author's experiences in financing and building a new $4 million Catholic elementary school facility and activities center in rural North Platte (Nebraska). Important points that lead to successful school building projects are highlighted and include establishing good relationships with all the stakeholders involved, developing a clear and well-substantiated need, selecting a quality building committee, selecting a quality architect in whom the entire community has confidence, and hiring a proven firm to lead the capital campaign effort. Good communication with all parties is stressed as key to all phases of the process. (GR)

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ED 447 678

FROM THE GROUND UP

Practical Information on a School Construction Project

April, 2000

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North Platte, Nebraska

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Wm. C. McGahan

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In a moment I will share some of the things I have experienced about financing and building school facilities during the past three years as we promoted, planned, raise funds for and built a new $4 million elementary facility and activities center.

First I would like to find out a little about you and let you know a little about our school.

A. How Many are PASTORS? BOARD MEMBERS? ADMINISTRATORS? TEACHERS?

B. Has anyone recently completed a building project?

Is anyone presently planning or building a new facility?

Dreaming about building a new facility? JUST looking for a place to sit down?

Background on school

North Platte Catholic Schools ... officially, St. Patrick School System: Opened 1891 by Sisters of St. Joseph. Staffed in 1910 era by the Dominicans of St. Catherine, KY. Since by Ursulines. 109 years. Currently: 430 students in at two track K-12. 40 faculty, 10 classified staff. Budget of $1.4 million. St. Patrick founding parish. Now serve Holy Spirit as well. St Elizabeth Ann Seton in other Diocese. We have a High School built in 1954 ... addition 1963 ... renovation in 1981 ... another addition in 1992. Elementary school (original K-12 school) built in 1916 ... remodeled in 1963. It is that building we are now replacing with new construction.

Strange the way the Lord works ... Urusline Sisters of Louisville came to open the school in 1916. When I became supt in 1974 we had fourteen sisters working in our school. This January our last Sister was forced to return to the Motherhouse ... so the Ursulines gave our community sacrificial service for the entire 84 year life of the current building.

Three times during late 60s, early 70s we were in serious jeopardy and near closing. Conservative financing and generosity of parents saw us through. Most significant in this era was the establishment of an Endowment/Development program in 1977. It has been our salvation. Our Endowment is an private charitable trust, not affiliated with the parish, specifically committed to the support of our school. Twenty-five years ago our parishes used to finance approximately 85% of the school budget, tuition 15%.

Now 35%. Tuition 33%. Endowment/Development 32%.

Last year we hired a PR / Recruitment director ....

Community: Approximately 25,000. Mostly rural area. Halfway between Omaha and Denver. Centrally located on I-80/ Hwy 83. Union Pacific our largest employer. We have the larges rail classification yards in the world. Very middle class community of railroad workers, service workers and professionals. Catholic population of about 1700 families. We usually draw about HALF of the available Catholic students. We generally enroll about 10% of the total school age population from financially well off to welfare families.

FROM THE GROUND UP

Thoughts on Building Construction Projects

I. ***Our alumni and parents carried the load. Alumni Assn reorganized 1981 (Distribute Alumni bulletin) ... 3 times a year/reunion every year. Parishes were our least supportive during capital campaign. Good support from business community ... a surprise to us ...***

II. ***Everything we did ultimately required the signature of the Bishop, including okay to begin planning, hiring of the architect, and the construction contract. Obviously any building process MUST include regular and thorough updates to Chancery and Parish.***

Our bishop has a "hands off" policy ... if you want to operate, YOU finance it. If you want to build ... it is your responsibility.
Parish giving is down by $1000 or more a Sunday at each parish ... how much is due to our building project is hard to say ... but remember some pastors point fingers., no doubt with reason.

III. *A building project does not happen over night ... in fact I frankly did not expect to live to see the day our community would build a new facility. The need for a new facility has been obvious for a quarter century. Since our 1977 school accreditation process the word has been ... you need a new elementary building. 1988 accreditation process said same. 1994 strategic plan again raised issue. Fiscal and facilities committee, formed in 1996 in response to the strategic plan ... did surveys of parishes, graduates, parents and faculty. In May of 1997 that committee recommended, and school board approved, a resolution stating a new facility (and appropriate future financing for the school system) must be part of our 3-5 year strategic plan.*
Aug, 1997, Board approved funds for a feasibility study specific to a new facility. Conducted by outside "expert," a consultant from UN-K. We did this very specifically to give VALIDITY to our vision ... something about prophets and their own country ...
January, 1998, the feasibility report was given to the board. It confirmed the need for a new building, but was hesitant on our ability to raise the needed funds. The Board voted to proceed and directed me to recruit a building committee. which was to prepare plans and estimates for a new two track elementary with activities center.
The Board also appointed the endowment board as the fiscal committee, responsible for funding the project.

IV. *Building committee hand picked. May not work in every case, but because of my long history with the school and because I would be "responsible" for the success/failure of the planning process, I felt strongly we need committe members who would work together.*

Committee of ten people. Myself. Endowment Director. The two primary donors (Approx $1.5 million). A private contractor. Owner of a heating business. An accountant. The City administrator. Two school board members, one an attorney.

Firm commitment to the committee work is important … a Board member and his wife … and they have been our weak link. Explain.

V. *We reached this agreement with the board before the committee started work. We were asking the committee to invest a considerable amount of time … frequently 4-5 long meetings or study trips a month. They deserved to believe that what they were doing was valued. In the end it truly was … the site, the exterior and interior design, a multitude of details were produced by this committee, and the product that is sitting on the site today is detail for detail what this committee recommended.*

VI. (Site Picture transparency) ….
Present facility by original church/parish. 3 stories … quarter block of asphalt parking lot as playground/church parking lot. For 25 years, presumed new elementary would be by the new parish: our 2nd largest donor wanted this site. Some on committee, including biggest donor, wanted it built on present football field. Others wanted it on a new site. Others wanted it on the site we chose … adjacent to high school but across the street. The site is away from both churches. Resulted in Chapel arrangement.
One of factors was availability of property, proximity of utilities, and it required the least amount (1') of additional fill to meet city requirements.
Site Prep …our site … two large buildings one brick, one steel. An 82 ton barbeque oven. Three houses. Three garages/out buildings. 15 large trees. $26,000 contracted. Much of work done by volunteers, starting in February of 1999. Relocation of bargain bin, pantry, wrestling practice, and oven ….

VII. *Within month of formation of bldg committee we requested a meeting with the Mayor, City Administrator, City Planner, City Engineer and City Attorney to tell them what we were planning and to ask for their input and good will. Over the course of next six months … worked with engineer and planner to meet all "concerns" about parking, fire and police safety concerns, closure of a street & utility access.*
City ordinance requires notification of property owners within 300' perimiter. Because we were asking to close a street they also required us

to notify everyone who lived on ten block length of Tabor street ... We contacted every household in the area BEFORE the official notices were sent by the Planning Commission. We held a neighborhood information meeting, two nights after our parent/parish information night, to explain to our many non-Catholic neighbors what was planned. NOT universally pleased. but opposition minimal. We also took out for coffee and discussions each of the Planning commission members and each of the City Council members. When the hearings took place we had 15 "yes" votes in a row .at the two hearings.. and only one council member who voted "NO" and that was on a vote to waive the city council's requirement for three hearings of any ordinances to close streets or replat property.

VIII. *The building committee has a great responsibility to develop a workable floor plan and general design of the building.*
We had some firm requirements to begin with: A chapel; The building must not face North; The roof must not be flat; It must be well insulated; It must be wired for technology and, All classrooms must be at least 900 square feet. We also agreed that a new elementary-secondary gymnasium would be important ... not only to improve athletic and P.E. activities for both buildings, but to influence support from alumni.
Specifically we made site visits to five elementary schools that had been recently constructed within a 150 mile radius of North Platte. Talked to administrators. Talked to teachers. Talked to maintenance people ... and in one case even to the contractor who was "finishing" a new building. These visits resulted in some specific parts of our plan: student lockers open and in the classroom; sink/fountain in each classroom; geo-thermal HVAC system; Technology arrangements.

IX. *Our architect ... one of three candidates we invited to submit bids. Two were parents of graduates. We did something a little differently. Usual "fee" is 7%. We said, this is a charitable work ... will be built with donations. The winning bidder should consider this and have it reflected in the bid. Successful bidder came in $50,000 lower ... a donation to the project and we had the architect we wanted to begin with. Good experience with school facilities ... good reputation with boards/administrators.*

But … don't expect it to go perfectly. Our architect seems to be over booked sometimes … and so busy that much of our work goes to "second & third level" employees. He sometimes gets caught in meetings lacking knowledge of details I believe he should know.
Also … architects do "sub-contract" details like HVAC systems to engineering firms or other experts …
Relate our experience on Wells …. (9 crutial weeks of delay … state entanglement).
Architect creativity … sometimes questionable in functionality … usually costly … sometimes slows process and irritates contractors.
The chapel area very attractive … but major process.

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So we have all these wonderful plans that are going to cost a minimum of $3.5 million …. HOW do we raise the money?
We were fortunate … we had an established Endowment/Development office. We had a history of over twenty years of direct contact and regular communication and solicitation of alumni, parents, and grandparents.
And you will remember … the school board had appointed the Endowment as the fiscal committee, so the financing became their responsibility.

X *We had previous experience with the company we selected. They did a campaign for us in 1991 that raised $950,000 (fell $280,000 short of goal) and helped us build a music and technology addition and add to our endowment fund. We were not happy with the individual who ran that campaign, but knew of good recent success produced by another campaign leader. Told them we would use their services if he would run campaign.*
Selected for leaders our two largest donors. They, in turn, worked with the endowment director to select people they felt they could motivate to be the six divisional leaders. With the company rep they carefully planned the campaign and selected the workers … nearly five hundred individuals in six divisions (Pacesetters, Bus & Prof, Alumni & Friends, and three parishes) … to make the contacts. We had a kick off celebration for Project 2000, to raise $3.5 million to finance a new elementary school and activities center, in November. By the end of

February the total had been reached, and on St. Patrick's day we closed the campaing with a victory celebration announcing a total of $3.7 million in pledges. The total is now over $4.1 million.
We were fortunate in two respects: 1) the owner of the firm we chose just happened to be one of our graduates, and he made a considerable donation of service as well as a cash gift to the campaign; and, 2) Another group of donors made a commitment to pay the cost of the campaign so we could tell those we solicited that all of their gift would go directly to the building project.

XI. *We did a lot of mail contact ... phoneathon, etc. Architect suggested virtual video. Building committee approved. Donor gave us $10,000. Produced 2,000 copies which were sent to every graduate, many parents of graduates and used in TV ads. Video and a Power Point presentation unvailed at kick-off and then used for small group presentations.*
(Show Video)
(Distribute brochures and prayers.)
Give Example of NPPS using all of our approaches ... kickoff, video, Power Point presentation, brochures ...

XII. *Use your best judgement, remembering that once you commit to a volunteer you are at their mercy regarding time schedule. Use your resources. Boy Scout Eagle projects. Parents with time and expertise. Usual suppliers ... i.e. cable company provided wiring for TV in each room ... phone service did trenching and conduit for fiber between buildings and an excellent bid, donating labor, on the phone system. Grants to finance technology or landscaping.*
Keep in mind these items are expenses ... and must be covered. I would estimate our non-contract "extras" will ultimately cost us somewhere in the neighborhood of $500,000 ... raising total cost to $4 million.

XIII. *We have invested a tremendous amount of time in meetings. I make daily visits to the site. (HARD HAT) Regular conversation with architect. Cultivated relationships with general contractor and sub-contractors. We have a monthly construction meeting with foreman and sub-contractors. Send weekly updates to building committe. (e-mail is a great device!)*

Monthly or more frequent updates to board. Maintained a journal of significant building activities ... to keep track of details for future discussions. Documented with photos (Talk about high school bldg)
I believe in limited site visits ... I personally visit each day. I take any member of the building committee or school board to the site if they ask. and as well as major donors.
Reason to limit ... second guessing becomes a problem.
Relate faculty visit ... and result.

XIV. *This generates very important support, interest and a sense of involvement and "ownership" for those not directly involved in the planning and construction process.*

A word about Recognitions: Not all may agree, but what our building committee agreed to do was have individual recognitions with no distinction between the largest donor and the smallest donor ... EVERYONE had a hand in the success.

Financing: may be necessary if you are building before all money is in hand. We will be getting about $1.5 million loan this summer to pay the balance of uncollected pledges. On the other hand, we are well ahead of what we expected to collect ... only one year into the process.

Power company is giving us a $30,000 rebate for installing geo-thermal system that meets their specifications for efficiency.

Building a new facility is very exciting. It is also very challenging and time consuming. The most important thought to me is this facility will touch the lives, the faith and knowledge, of several generations I will never know ... and that is what it is all about.

QUESTIONS??

HANDOUT

FROM THE GROUND UP

Thoughts on Building Construction Projects

I. Over the long term: Establish the best possible relationship with the school's various publics. You can do little without general support from your parents, alumni, parish(s) and business community. The school board/parish board must be united in support for the project. Alumni and current parents will be the best source of project financing. Cultivation of the alumni is a long process, as is collecting addresses and phone numbers and developing mail and phone contact.

II. A positive working relationship with the pastor(s) is essential. Even if there will be no visible cost to parish, in most cases the school property is owned by the parish/diocese corporation and therefore any building project must have the support and good will of both bishop and pastor(s). A capital campaign will generally have some impact upon parish giving.

III. Substantiate your need. Strategic planning, school mission statement, surveys and questionnaires, outside review of feasibility, extensive committee work and discussion all should support the necessity and rationale for the project.

IV. Selection of a strong building committee is paramount to final success. The committee should not be too large and should have people who can work together and support group decisions. A variety of backgrounds, preferably with experience with building projects, is vital to drawing general public support for committee decisions. The chief administrator and chief financial officer should be members. Faculty need not necessarily be on the committee, but faculty input regarding general classroom design will help build acceptance for the project.

V. Once a building committee is appointed it is important they have the confidence of the pastor and governing body. They should be allowed enough autonomy to do their work and enough respect to receive general support for their final recommendations.

VI. Site selection and preparation are critical. Where is the best location? It should fit your demographic information. If possible it should be tied to a traditional location. Proximity to a church is also important. Availability of land parcels, cost, access to utilities, public streets and services all influence the final decision on where to build. The amount of site preparation required is a factor as well.

VII. Another imperative is a good working relationship with city/county officials. The location, parking, streets, utilities, permits and many other specifics of a building project must be approved by planning/zoning committees, fire and safety departments, city engineers and ultimately by mayor and city council. This process usually includes public notification, contact with all neighbors, and public hearings before planning committee and city council.

VIII. **Pre-planning and careful research will make the project go better in the long term. There is no substitute for good information and a well informed building committee. Three excellent sources of background information when planning school facilities:**
http://www.edfacilities.org/
http://www.asumag.com/home/default.html
http://www.ed.gov/EdRes/EdFed/ERIC.html
Nothing is as helpful to planning as visiting a number of recently constructed schools to SEE what is being done and discuss what they did, why they did it and whether they have "regrets" about specific decisions. Money invested in this process is money well spent and will pay dividends as the project moves forward.

IX. **Select an architect in whom the entire committee has confidence. This person will make many extremely important decisions in your behalf and needs to be willing to listen, respond to input and concerns, and have experience and knowledge in school design and construction. Contact board members and administrators of other schools for whom the architect has done major work.**

X. **Capital campaign leadership will make or break your effort. Hire a proven firm and request a strong campaign director. Name your best possible leader(s) and financial supporters to the top leadership positions of your campaign. Give them a role in the selection and recruitment of "division" leaders. Once again pre-planning will make a considerable impact on ultimate success. Know where you need to go and have a plan for getting there.**

XI. **Sell your building project and your capital needs just as you would any major product. Well prepared materials and advertisements do have a strong influence and encourage dialog. Local "talk" shows and other exposure help build community confidence and interest in your appeal. Nothing can take the place of personal contact. (Video)**

XII. **Careful consideration needs to be given to what items will be part of the general construction contract and what items can be handled by the school, its suppliers and volunteers. Desks and chairs, grass and irrigation, and other such "unattached" items may be handled by a generous donor or by volunteer labor. Paint, built-in fixtures, and other "attached" items are best included in the actual construction bid.**

XIII. **If you are chief administrator of your school, EXPECT to have oversight responsibilities regarding planning, bidding, and construction. Someone needs to look out for the school's best interests and you are the "one" who is there every day. You represent the "owner" during the construction process. This will be in addition to all of your regular administrative duties, so plan to be very busy for a year or more.**

XIV. **Communication is the key in all phases of the process. It is particularly imperative to keep building committee, school board, advancement director and pastors up-to-date on progress and problems. School community and alumni also deserve periodic updates.**